

Realizing the MaaS promise?

Current limitations & forward looking requirements

MaaS will eventually benefit to all stakeholders



Consumers

- Improved **customer experience** by providing **freedom to move** using multiple **mobility options** based on **preferences** (trip duration, modes, cost, environmental)
- ... triggering a **move from ownership towards usage** of mobilities “as a service”
- **Reduction of overall mobility budget** (cost of usage vs. total cost of ownership)



Cities/ Authorities

- Ability to orient behavior towards **more sustainable** mobility solutions: mass transit, walking, cycling, new mobility solutions
- **Serves public good** by increasing **accessibility** and **inclusiveness** of mobility (through first-and last-mile solutions), improved **quality and reliability** and **tariffs integration**
- **System-level optimization** of investments and **assets utilization**



Mobility Solutions Providers

- **Real-time optimization** of the each of the mobility offerings
- **Expanded access to all mobility needs** expressed, thereby increasing the addressable market and **reducing acquisition and customer support costs**
- Provision of an **additional channel for communicating and engaging** with users

Latest evolutions – *MaaS enablers*

More openness from authorities towards new mobility solutions providers (cf. Covid19), increasingly considered as **“part of the solution”**

MaaS is top of mind of policymakers – Interest and willingness to frame (e.g. data sharing policy, MSP regulation) **and enable MaaS** (public data-lake, back-end,..)

Enlargement of MaaS technical suppliers' base. *Emergence of new actors and partnerships for comprehensive MaaS and specific building blocks*

Accelerated digitalization of mass transit ticketing and payment ... while several (card-centric) ticketing systems still require upgrading

Latest evolutions – MaaS market, business models and offerings

Acceleration of MaaS deployment in Europe and worldwide

..While many initiatives are still at pilot stages or with limited modes coverage and functionalities

Notable increase of public-led MaaS initiatives (G2C):

Increased # of G2C platforms, incl. open to 3rd party B2C MaaS operators

... but still several walled gardens!

Private led B2C MaaS platforms expansion

... even if time-to-market is (much) slower than expected

e.g. Whim (five cities), Ubigo (soon 2 cities)

Regional MaaS offerings are emerging

e.g. Yumuv in Switzerland, MaaS in Skåne region, Renfe RailMaaS,..

... and revived interest for rural MaaS

B2B offerings have recently appeared

Often linked with fiscal incentives (“mobility budget”)

... but current MaaS endeavors have *limitations*

- **Time to market:** deployment of MaaS platforms not going as fast as expected
- **User adoption:** MaaS offerings have found little traction and modal shift promise not yet delivered
- **PTOs resistance:** lack of clear partnership models with MaaS operators is as major obstacle
- Consumer-facing B2C MaaS platforms **haven't yet reached scale and economic viability**
- Expected **benefits for MSPs** (reduced acquisition & service costs) not materializing



Is there a real business case for MaaS or are we all going after a ghost?

Financial outlook? **Limited scale & profitability yet...** but it's a *journey!*

B2C

- **Commission-based model** (% on each booking) **requires** scale. e.g. 5% commission on 20k weekly eScooter trips at avg €5 would yield only €260k/year
- **A subscription-based model** (“fee for all mobilities”) **has high potential** (tapping into private cars’ budget)... but requires to **built trust to shift mindset**

G2C

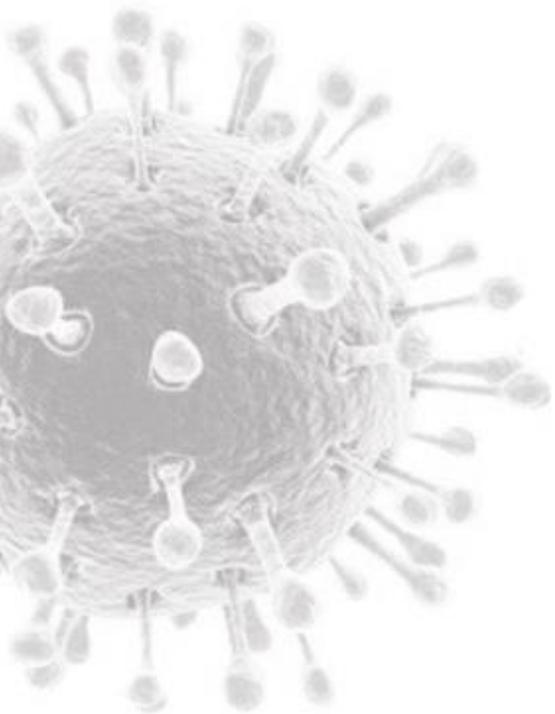
- Similar logic applies, but other **public benefits could be considered** such as societal, social and environment impacts and (ultimately) public assets optimization
- Opportunity for PTO to **increase the attractiveness** of the core PT offering
- If it is based on **open model**, G2C MaaS can help **accelerate MaaS B2C**

B2B(2C) or G2B(2C)

- Interesting model to accelerate **users adoption**, esp. if linked to fiscal incentives
- ... but also to **drive additional revenues** through sales of **additional business services** (mobility account, travel expenses), generating revenue from day one!

? *To which extent should MaaS be subsidized if it drives public benefits?*

MaaS x Covid19 – Which opportunities for MaaS in the “new normal”?



*In the short term, the pandemic had a **negative impact on MaaS development**, as its business model largely revolves around trips performed with shared mobility, that are suffering from collapsing demand and trust*

*MaaS could contribute to **increased system resilience** (choice & ease of use of multiple mobility options) and rebuilding trust by providing real-time multimodal information considering preferences and circumstances...**provided there would be sufficient adoption!***

*If properly framed, MaaS has the **potential to positively contribute to deliver the promise of sustainable, resilient and human-centric mobility systems...***

Prerequisites for accelerated MaaS deployment & adoption

Data sharing regulations & open ticketing/payment for all modes

Data sharing and opening of PT ticketing and payment are requirements for MaaS

... but to maximize MaaS mode coverage, regulation should apply to all MSPs/mobility modes

Multiplicity of market models will drive UX! (G2C + B2C/B)

Increased PTA involvement in MaaS is good to drive virtuous MaaS development!

... but public/private collaboration is key for MaaS success and closed models should be avoided: **PT data and APIs should be open to 3rd party B2C / B2B MaaS platforms**, under fair conditions & with regulated bi-directional data exchange

MaaS is not an app.. Investments in physical services & infra are critical

Seamless mobility is a requirement to drive MaaS as an alternative to individual car ownership

Accelerated investment in mobility services and multimodal infrastructures are critical!

Forward looking requirements to realize the MaaS promise

City transportation policies & MDM

Regulations (space, modes), **investments** in **superior services** and **infra.**, **marketing**

Management & Enforcement vs. MSP

Dynamic management of MSP & regulatory enforcement, incl. **trip-based subsidies?**

Exhaustivity of Modes/Infra coverage

Optimization of mobility flows & assets requires to cover **all modes & infra**, including the **private cars!**

Geographical extension

Development of **regional MaaS** (incl. inter-city modes) and of platforms **interoperability**

MaaS + TaaS

Integration of MaaS with the **movement of goods** (Transport-as-a-Services)

PTA capabilities

Further development of **capabilities** is required for **cities to step up** and govern mobility holistically

Holistic data mngt is the new oil!

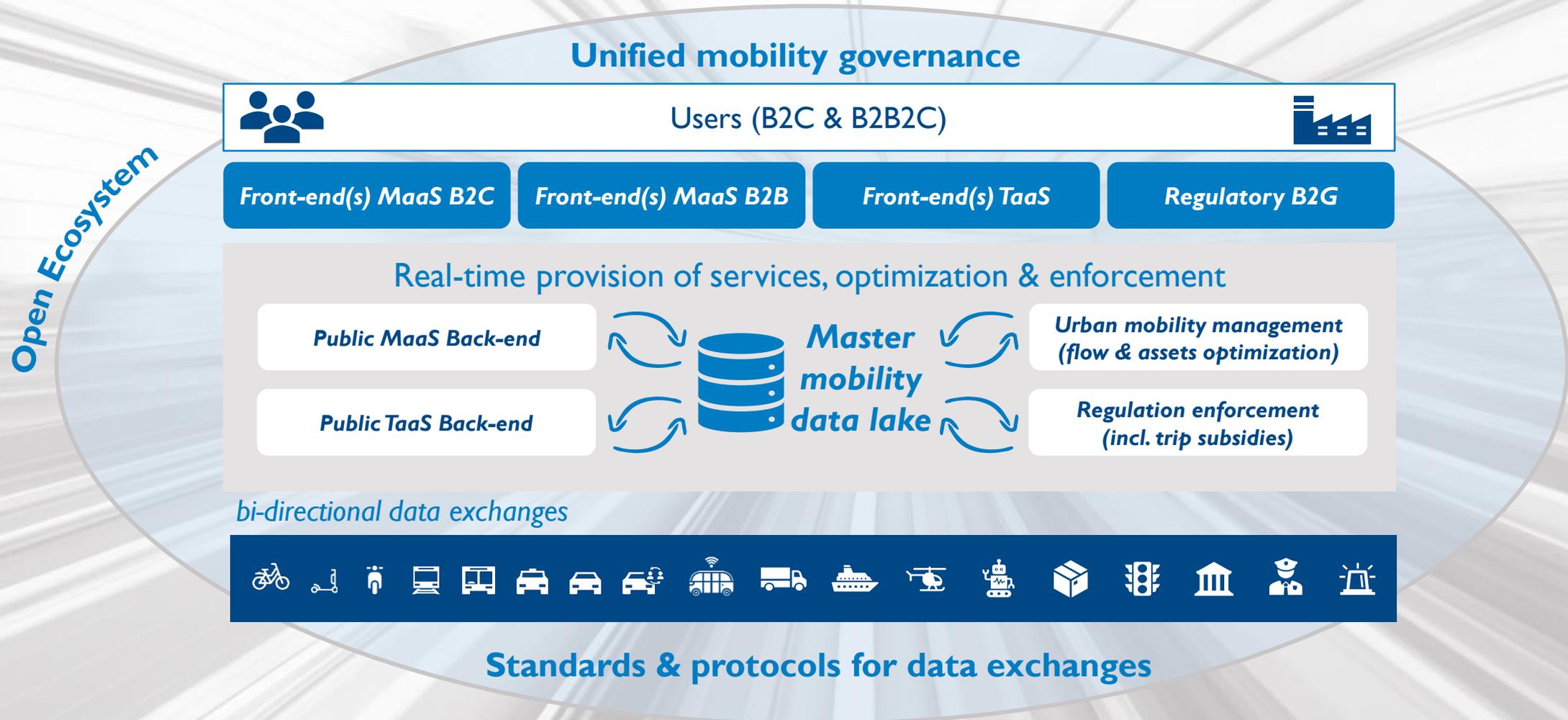
Holistic and open mobility data-lake. ... linked with traffic mngt system of Smart Cities

Unified Governance

Integration of public and private stakeholders (incl. civil society repres.) into a **unified governance**

► **Collaboration & mastering the ecosystem play to create shared value!**

Beyond MaaS – Towards a Unified Mobility Management Model?



Key take-aways

MaaS has **not yet delivered on its promises...** but it's a **journey** and there are **huge benefits ahead** justifying continuous efforts

... some MaaS enablers materialized over past years, but **further effort & openness is required** (esp. by Cities and PTOs) to **enable MaaS**

... MaaS is **not just an app!** Sound **city mobility policy** is required to build **trust** and drive adoption! (i.e. physical services & infras)

... realizing **the MaaS promise** will require a **more comprehensive take** as well as **increased collaboration** amongst stakeholders

A **Unified Mobility Management Model** would help to fully extract value at system level... **Can we make it happen?**

“Who says it can’t be done?”

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